Final Report

For

Document Imaging Pilot Project

AGENCY:
MONTANA SECRETARY OF STATE

CONTRACTOR:
Perceptive Software

October 14, 2011

Scope of Work

The goals of the SOS document imaging/workflow/document management pilot project were to:
1. Identify an alternative, cost-effective system
2. Lower cost of ownership/lease than current system
3. Improved infrastructure/architecture over current system
4. Improved up-time and performance over current system
5. Pilot a document management engine that meets SOS information management requirements.
6. Exercise imaging and workflow prototypes that can help re-engineer Business Services paper-based work processes.

Contractor provided hosted services and system development for a document imaging, document management and workflow pilot project.

Final Report

The pilot project was successful based on the validation of the project requirements in the attached SOS Pilot Testing Plan. Please review that document for detailed testing results.

Overall, the pilot project went very smoothly. Perceptive Software's project initiation, planning, requirements gathering, configuration, implementation, and support were all top notch. Their attention to detail and understanding of the customer's needs and how to match that to their product were excellent.

The onsite visit during detailed requirements, configuration and implantation was extremely productive, and Perceptive staff was very focused, knowledgeable and helpful during the entire process.

The ImageNow software's "learn" mode easily integrated with two different SOS applications in order to capture image and work item index information during key steps in the business process. This would allow SOS to move forward with much needed business process re-engineering, and to move from a paper-based to image-based processing model.

While some of the requirements around automated redaction, records disposition, and records retention were not able to be fully exercised with the limited scope of the pilot project, the full functionality does exist in the software. With a full implementation, a data interface with the mainframe corporate records database would be required to completed the records disposition and retention requirements.

SOS had no concern about the full functionality of the Perceptive ImageNow software solution, or its ability to meet SOS imaging, workflow, and records management requirements with a full implementation.

Like every other agency in the state, the Secretary of State's Office has been working hard to cut fixed costs in technology that supports the office's mission. One of the main factors in seeking out a new imaging solution was the cost of the SITSD-hosted FileNET solution.

However, SOS FileNET costs declined 40% under the new SITSD rate structure implemented on July 1, 2011, as seen below.

SOS FileNET Costs with SITSD
FY11: $29,546
FY12: $17,642 (projected, based on 2 months of actual costs)
      $11,904 difference

Perceptive Software proposed two different ImageNow pricing models based on SOS document volumes:

	Subscription licenses	**Purchased licenses**
One Time Costs:		
Licenses	N/A	$ 91,685
Professional Services	$20, 825	$ 19,375
Services Setup	$ 6,500	$ 6,500
Training	$ 2 ,700	$ 2,700
Total-One Time Fees	**$ 30,025**	**$120,260**
Annual Support	N/A	$ 18,337
Monthly Cost	$ 4,954	$ 2,294
Total Annual Cost	**$ 59,448**	**$ 45,865**

Given the new FileNET pricing model with SITSD, SOS has to decide if the added functionality and other benefits of the Perceptive ImageNow product are worth the added cost.